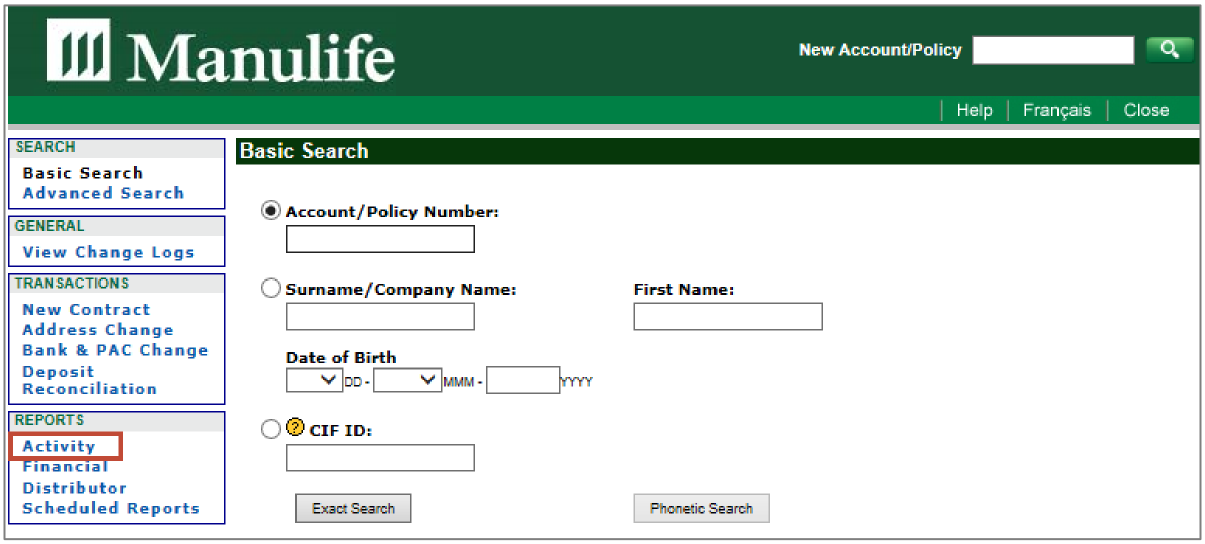
My Clients reporting

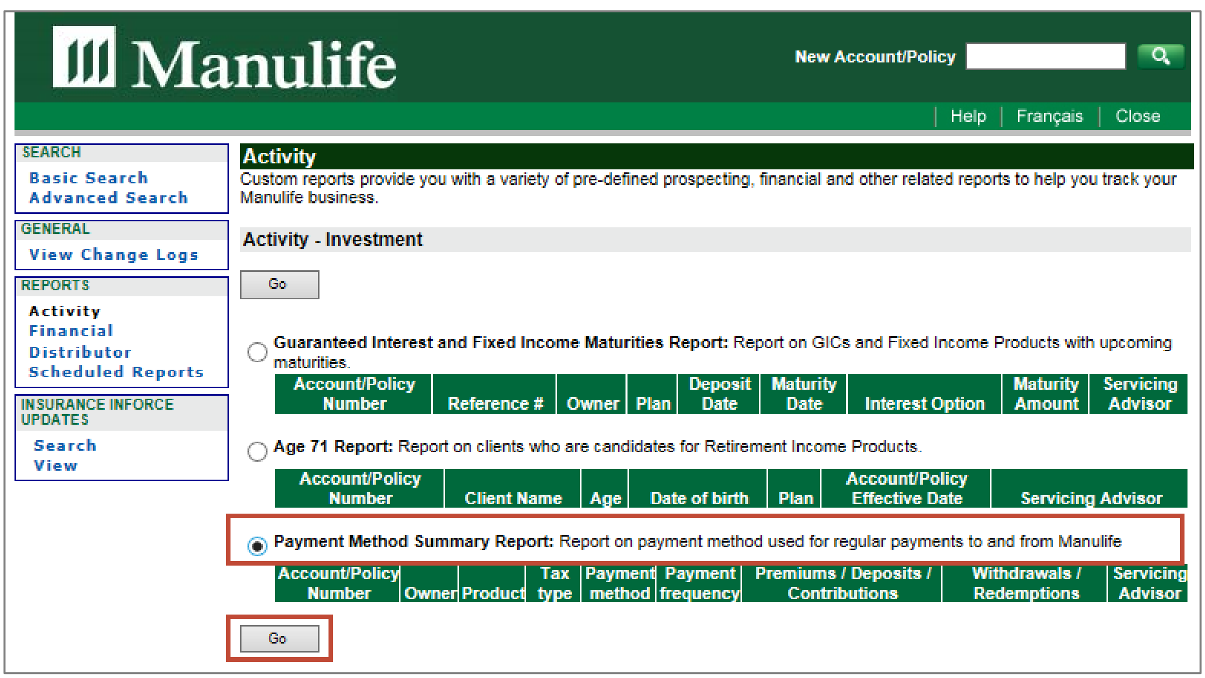
Payment method summary report

Within **My Clients**, you can generate a report that highlights the various payment methods that your clients are using for active insurance policies and investment contracts/accounts. To generate the report, follow the steps below:

Step 1: Once logged into **My Clients**, select **Activity** from the **Reports** menu.



Step 2: In the **Investments** or **Life and Living Benefits** section, select **Payment Method Summary Report** and then select **Go**.

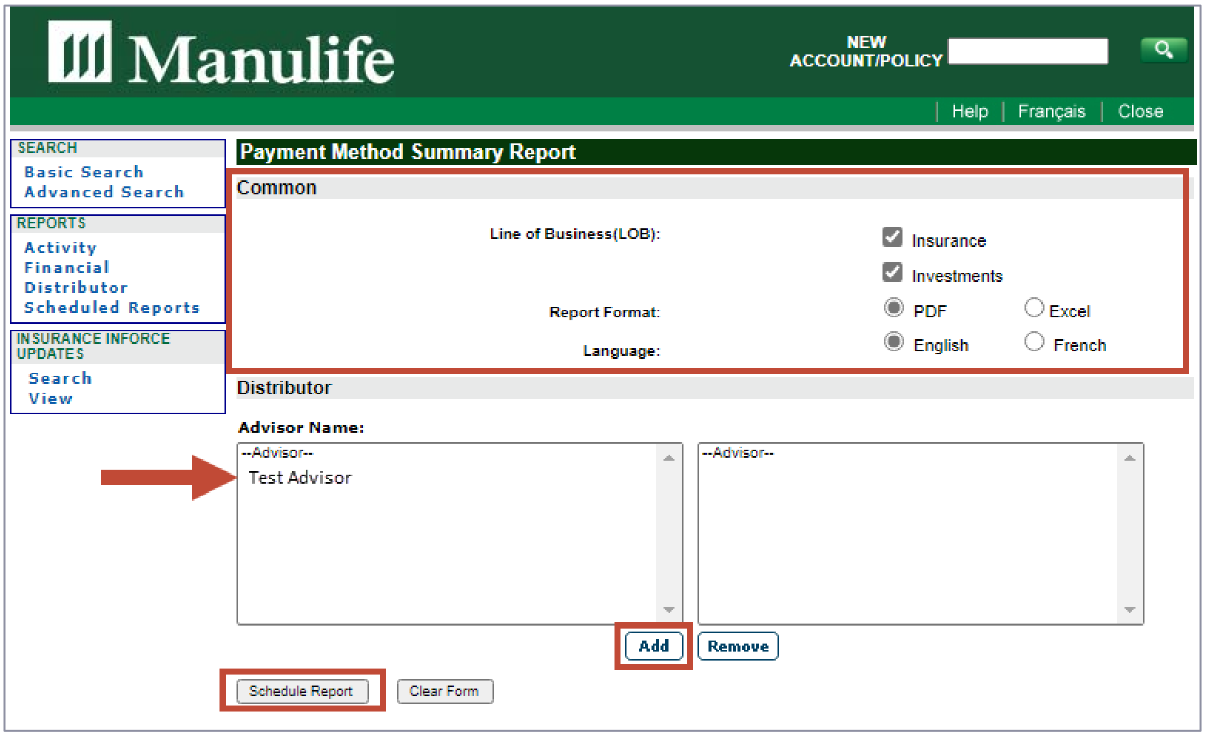


Step 3: In the **Common** section, select the **Line of Business, Report Format** and **Language** preference.

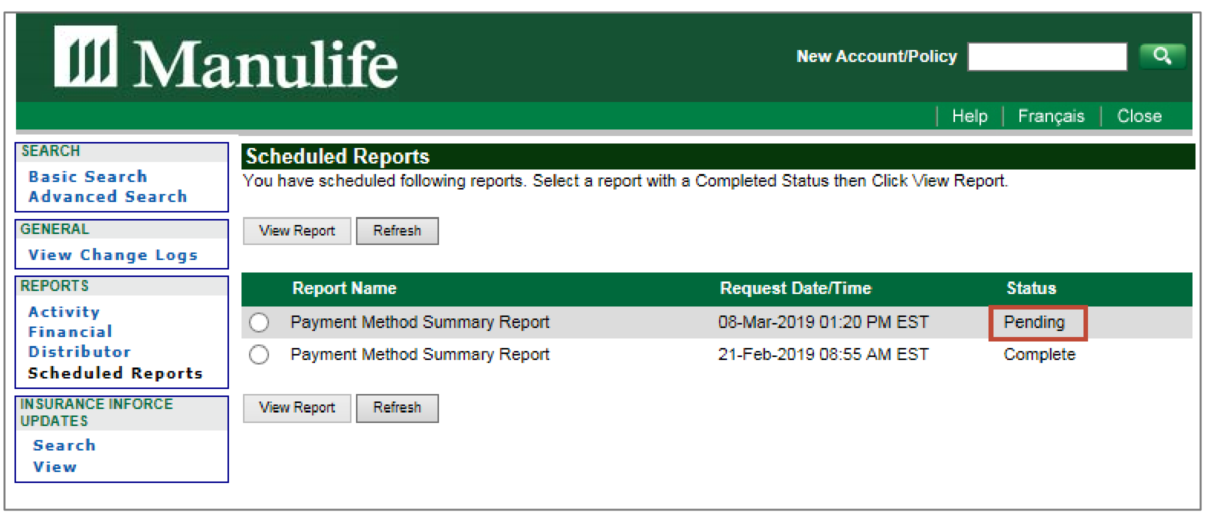
Step 4: **For back offices only:** Reports may be generated for a specific advisor. Enter the **Advisor name,** click **Find Advisor** and proceed to step 5.

Step 5: Select the advisor's name and click **Add**. You can add more names to the list box by following the same process.

Step 6: Select **Schedule Report**.

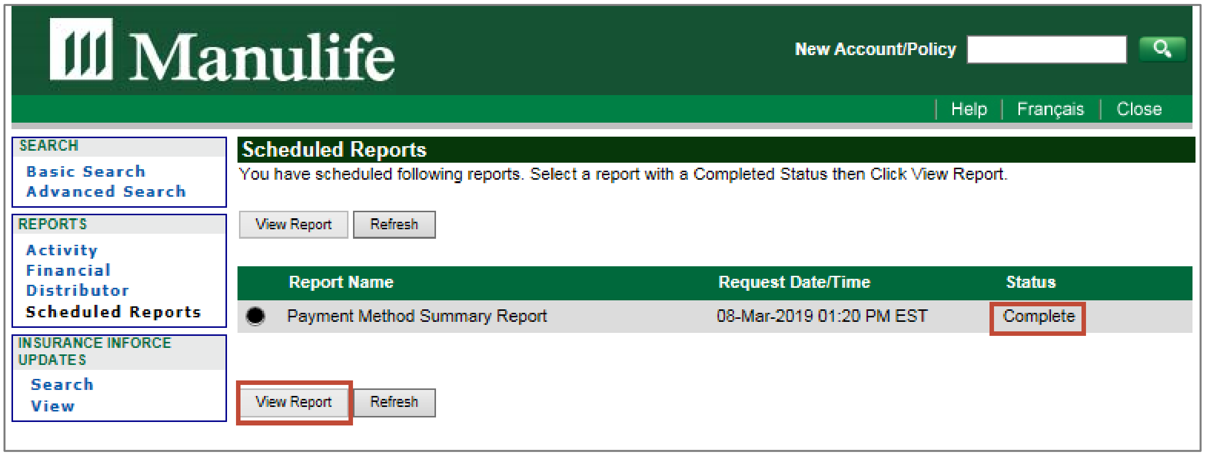


Step 7: The report will then be added to your list of **Scheduled Reports**. The status will show as **Pending**. Depending on the number of results, it could take a few minutes to generate the report.



Step 8: Click **Refresh** to reload this screen and check the status of the report.

Step 9: Once the status has changed to **Complete**, select the report name and click **View Report**.



Please note: The payment method summary report will only display one PAC per client. If your client has multiple active PAC's, please review My Clients for further details.